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PURCHASING USER MANUAL

APPROVING A REQUISITION

INTRODUCTION

Requisitions, or requisition line items, are approved based on the workflow they are assigned to. A workflow is the path for routing a requisition to a person or a group of people for approval. Each workflow can have as many approval levels and as many approvers as needed.

A requisition can be made up of several line items and each can be assigned to different workflows. Therefore a requisition may need to be approved by several different approvers before it is ready for purchasing.

The requisition line items and the approvers must be assigned to the same workflow in order for the approvers to be able to approve those line items.

In addition, your agency may use Requisition Departments. In this case, the approvers must also be assigned to the same Requisition Department as a requisition in order to approve it.

Furthermore, your Purchasing administrator may set up approver rules for each approver, restricting them to approving items based on dollar amount or a certain type of fiscal code(s).

Finally, your Purchasing administrator may enable certain approval restrictions, such as restricting approvers from approving their own requisitions.

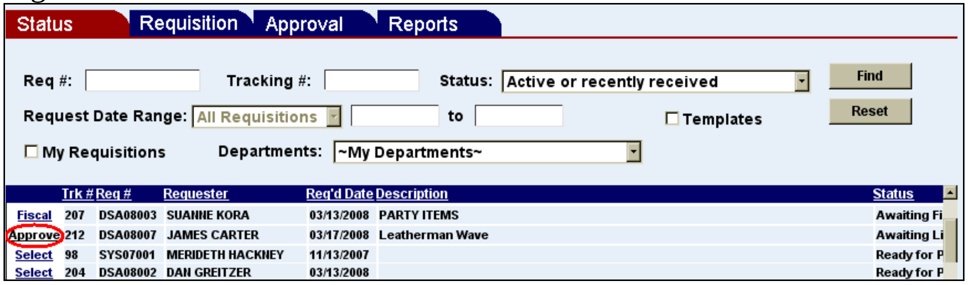
You will not be able to approve a requisition if:

- You are not part of the requisition workflow.
- You are not part of the Requisition Department and your administrator has restricted approvals by department.
- The line item(s) have fiscal coding or a dollar amount which your approval rules do not allow you to approve.
- You created the requisition and you are an approver, but the administrator has restricted approvers from approving their own requisitions.

TO APPROVE THE REQUISITION

1. Depending on your agency’s process and the role you have been assigned by your administrator, open a requisition to approve:
   - Click **Approve** next to a requisition on the **Status** screen (The **Status** may be **Awaiting Line Approval** or **Awaiting Requisition Approval**, depending on the status of the line items in a requisition.)
   - Click the **Approval** tab if you have completed the fiscal coding of the requisition, are authorized to approve your own requisition, and now need to approve it.

Figure 1 - Status screen

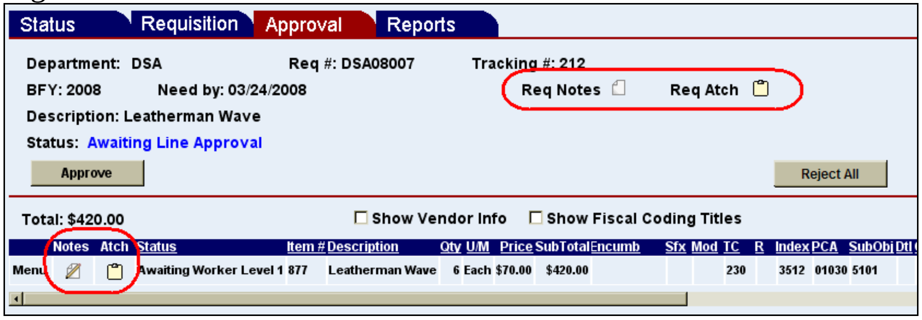


Req #:
Tracking #:
Status: Active or recently received
Request Date Range: All Requisitions to
☐ Templates
☐ My Requisitions
Departments: ~My Departments~

	Trk #	Req #	Requester	Req'd Date	Description	Status
Fiscal	207	DSA08003	SUANNE KORA	03/13/2008	PARTY ITEMS	Awaiting Fi
Approve	212	DSA08007	JAMES CARTER	03/17/2008	Leatherman Wave	Awaiting Li
Select	98	SYS07001	MERIDETH HACKNEY	11/13/2007		Ready for P
Select	204	DSA08002	DAN GREITZER	03/13/2008		Ready for P

2. If necessary, review the **Req Notes**, **Req Atch**, or the line item **Notes** and/or attachments (**Atch**) to review any information that helps you determine whether or not to approve the requisition line items.

Figure 2 - Notes and Attachments icons



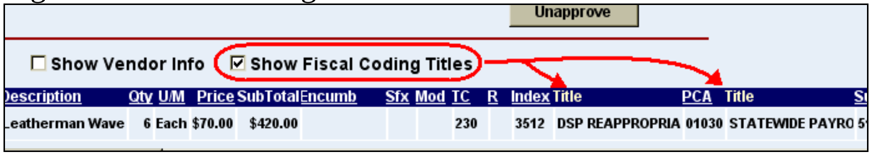
Department: DSA
Req #: DSA08007
Tracking #: 212
BFY: 2008
Need by: 03/24/2008
Description: Leatherman Wave
Status: Awaiting Line Approval

Total: $420.00
☐ Show Vendor Info
☐ Show Fiscal Coding Titles

	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Encumb	Sfx	Mod	TC	R	Index	PCA	SubObj	Dtl
Menu			Awaiting Worker Level 1	877	Leatherman Wave	6	Each	$70.00	$420.00				230		3512	01030	5101	

3. If needed, check the **Show Fiscal Coding Titles** check box to display and review the fiscal code titles. (An approver cannot change fiscal coding, but can reject a line item for fiscal coding changes.)

Figure 3 - Fiscal Coding Titles

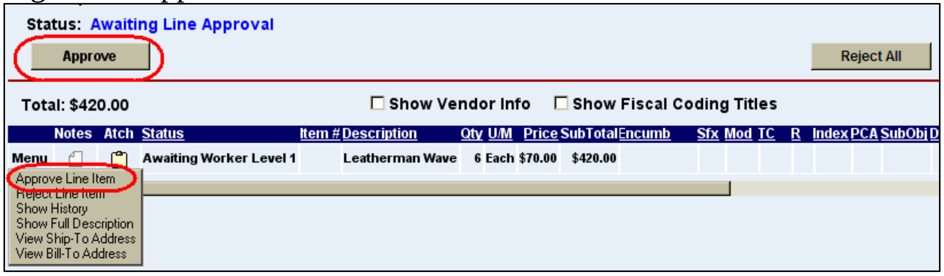


☐ Show Vendor Info
☑ Show Fiscal Coding Titles

escription	Qty	U/M	Price	SubTotal	Encumb	Sfx	Mod	TC	R	Index	Title	PCA	Title	S
eatherman Wave	6	Each	$70.00	$420.00				230		3512	DSP REAPPROPRIA	01030	STATEWIDE PAYRO	5

4. If needed, check the **Show Vendor Info** to display and review the vendor information, if available.
5. If needed, click **Menu** next to a line item and click **Show Full Description** to display the full text of the **Description** field.
6. To approve all line items of the requisition, click **Approve**. The **Approve** button will only be active if the approver has rights to approve every line item.
7. To approve individual line items of the requisition, click **Menu** next to a line item, and then click **Approve Line Item**.

Figure 4 - Approve button and Menu


Approve
Reject All
Approve Line Item
Reject Line Item
Show History
Show Full Description
View Ship-To Address
View Bill-To Address

Status: Awaiting Line Approval

Total: $420.00

☐ Show Vendor Info ☐ Show Fiscal Coding Titles

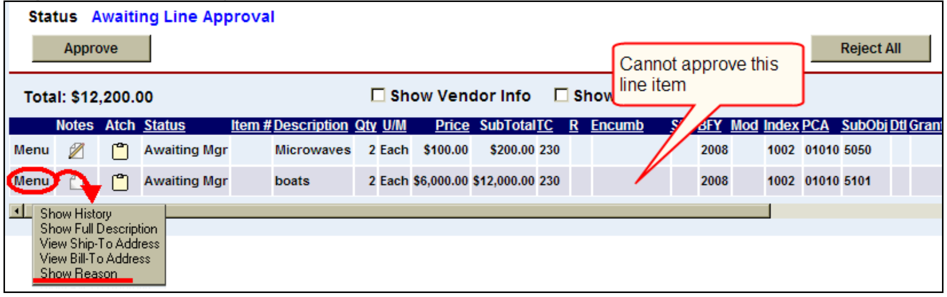
	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Encumb	Sfx	Mod	TC	R	Index	PCA	SubObj	D
Menu			Awaiting Worker Level 1		Leatherman Wave	6	Each	$70.00	$420.00									

8. To reject all line items of the requisition, click **Reject All**.
9. To reject an individual line item of the requisition, click **Menu** next to a line item, and then click **Reject Line Item** (or **Reject all lines** if it is an "All or nothing" requisition). NOTE: A Purchaser can reject a requisition item after the final approval.
10. When finished approving, the requisition status will be **Ready for Purchasing**.

REQUISITIONS YOU ARE UNABLE TO APPROVE

Requisitions or requisition line items shaded in purple mean that you cannot approve them. Open the requisition to approve and then click a line item **Menu** and **Show Reason** to find out why you cannot approve the item.

Figure 5 – Items you cannot approve


Approve
Reject All
Cannot approve this line item
Show History
Show Full Description
View Ship-To Address
View Bill-To Address
Show Reason

Status Awaiting Line Approval

Total: $12,200.00

☐ Show Vendor Info ☐ Show

	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	TC	R	Encumb	S	BFY	Mod	Index	PCA	SubObj	Dtl	Gran
Menu			Awaiting Mgr		Microwaves	2	Each	$100.00	$200.00	230				2008		1002	01010	5050		
Menu			Awaiting Mgr		boats	2	Each	$6,000.00	$12,000.00	230				2008		1002	01010	5101		

There may be restrictions set by your Purchasing administrator, such as:

- You are not part of the requisition workflow.

- You are not part of the Requisition Department and your administrator has restricted approvals by department.
- The line item(s) has fiscal coding or a dollar amount which your approval rules do not allow you to approve.
- You created the requisition and you are an approver, but the administrator has restricted approvers from approving their own requisitions.